IT Strategy Management

Overview of Emma Email Marketing Tool

Overview

Emma is the preferred email marketing tool supported by University Communications and Marketing (UCM) and used by the Campus Engagement team. The following page outlines all major functions of Emma and the Builder Editor interface, which has improved functionality from the prior Legacy version.

Procedural instructions for the Legacy interface can be found by visiting **Publishing the IT Weekly Newsletter + OHIO IT Updates Agenda** or the **Overview of Emma Email Marketing Tool**.

Table of Contents

Emma Email Marketing Tool

Access your account

1. Send a request to Nick Clausen asking for Emma permission. Copy Amanda Davis on the email. This request should include the name of the user who needs access, their OHIO ID, and their reason for access.
2. Shelli Minton will initiate contact with the new account user.
3. Once the new account user has been added to Emma, an email with a link will be provided allowing access to the dashboard of OIT’s Emma sub-account.
4. The login information will be the user’s complete *OHIOID@ohio.edu* and then the user will be prompted to generate a secure password.

Navigating from the dashboard

1. Once logged in, the first screen is the dashboard. The dashboard functions like Emma's homepage.
2. The dashboard will have a calendar located on the left navigation of the web page for easy accessibility to click on a specific date to display any mailings that are scheduled or have been sent on that specific date.
3. Along the top of the dashboard are the following links. The below sections will detail what functionality occurs under each of these sections.
    a. Home
    b. Audience
    c. Campaigns
    d. Response
    e. Automation
    f. Insights

NOTE: You must be logged into EMMA in order to view these pages.

Sections of Emma

Dashboard

The dashboard (Home tab) contains several items:

- A snapshot of the last 30 days of emails
- A monthly calendar located on the left navigation allows for easy access to view emails by distribution date
- A shortcut to create and send your first mailing (if you are a new user). Additionally, you can build your audience from this page.
- A shortcut to create a new mailing (if you have sent mailings before)
- Recent mailings are displayed towards the bottom of the page with a snapshot of information surrounding that specific email, including analytics

Audience

This section is where your contacts reside. The left navigation offers two subgroups: Manage and Grow.

Manage

- Contacts
  - Displays the number of contacts that are active, in error, or have opted out of the email list
  - Allows you to add new contacts one at a time
- Contact Fields
  - Allows you to add, remove, or rearrange fields for contacts
  - By default, it will list the first and last name
- Groups
  - Allows you to create groups, which are a set of contacts with the same distinguishing feature (i.e., Instructors, All IT Staff, etc.)
  - Any contact can belong to any number of groups
- Segments
  - Can act as a query or search field within the audience section. There are different segment types that you can filter by. You can name and save each segment or filter type so that you can use it repeatedly.

Grow

- Forms
  - Forms can be used to add elements to help grow the newsletter list
- Subscriptions

    - Subscriptions allow your contacts to be able to modify the frequency and content that they receive from you.
- Imports
    - Allows you to import multiple contacts at once, either from an excel or .csv sheet
- Connect
    - Allows Emma to integrate with other programs. Examples of integrations include *Eventbrite*, *ClubReady*, *MINDBODY*, and *Infusionsoft*.

Distribution List

A distribution list allows you to send a communication to a specific group of people. It can also be utilized to personalize an e-mail correspondence.

1. List your contacts in an Excel spreadsheet (xls. Xlsx. or CSV file types are accepted).
2. Visit the Mass Email Distribution List Initial Preparation to review your list before proceeding to the next step.
3. Make sure that the columns in the list use simple headings such as first name, last name, email, etc.
4. Save your excel spreadsheet somewhere it is easily accessible.
5. Navigate to the **Audience tab**
6. Select **Imports** from the left navigation bar.
7. Select the blue **Import Contacts** button in the upper righthand corner of the screen.
8. Either drop the new file into upload box or select **Choose File** to browse your computer.
9. Select the source of the content. This should preferably be the original source of the distribution list so that you can reference the exact origin. If a source is not available from the dropdown, then you can select add a new source at the bottom of the dropdown.
10. A dialog box will open with a editable field. Enter the name of the source then click save.
11. Use the 1st radio button titled “update their records with information from this import (add and update).”
12. Leave all remaining check boxes unmarked.
13. Select **Continue**.
14. A map of the columns in the list will be presented. Make sure that the rows and columns in the list are being labeled correctly by Emma.
15. Select **Continue**.

16. The next screen will give you the option to either update an existing group (select the desired group with a checkbox) or add a new group.
17. If adding a new group, simply place your cursor in the box, add a unique title (be as descriptive as possible. Make sure to add the name of the communication and the date), then select **Add**.
18. The new contact group will be auto populated into the list.
19. Scroll down the page to the end of the list and select **Continue**.
20. Review the summary to ensure that all information is being presented correctly.
21. Select **Import**.

Campaigns

The campaigns tab will allow you to build and send emails. The following procedure walks you through building and sending an email.

- You can create a campaign from scratch or duplicate an existing one.
  - To duplicate:
    - In **campaigns,** navigate to the email you want to copy.
    - Select the arrow to the right of the email.
    - Select **duplicate** in the drop-down menu.
    - You can now retitle your email and edit it without impacting the original one.
    - Duplicating previous successful emails is an easy way to keep branding consistent.

  - To create from scratch:
    - Select **Create a new campaign**. Two options will appear:
      - Select **Regular email** if you are wanting to send an email to a distributed list
      - Select **A/B Test** if you would like to send two options of an email to be able to test which one performs best
    - Select the **My templates** section, which will appear and contains a footer that says, “Office of Information Technology.”
      - To keep branding consistent, UCM has already developed a template to follow. The publication type you are wishing to create (i.e. weekly newsletter, mass email to OIT, etc.) will define what elements of the template will remain or need to be modified.
      - Note: If you are creating an IT Weekly Newsletter, follow the Publishing an IT Weekly Newsletter Procedure.
      - Emma uses a drag-and-drop interface. You can easily move content blocks and customize, as needed.

        - To add a content block to your email, drag and drop from the left-side menu.
            - To edit a content block, hover over it.
            - Select the **compass icon** to move the content block.
            - Select the **gear icon** to edit properties like background color, margins, padding, and border style.
            - Select the **plus** icon to duplicate the content block.
            - Select **Text pasting** to paste text with or without formatting.
            - Select the **trashcan** to delete the content block.
        - When a content block is selected, from the top menu bar, you can edit text, alignment, links, and HTML.
            - In the top-left drop-down, you can select the text style. (ex: header, paragraph).
            - Select the **link** icon to insert a hyperlink.
            - Select **insert** to insert an anchor or other items.
            - Select **< / >** to view the HTML.
        - **Important** - Emma does not have an **Undo** button! You can revert to previous versions by selecting **Revert to** in the top menu bar.

            - UCM has specifically styled each
              element to follow OHIO brand standards; be mindful to keep pieces cohesive if adding your own HTML.
            - Review the [Style Guide] to maintain consistent brand and language standards.

- Preview the template
    - In the editor view, select **Preview**. This will display the email in desktop, mobile, and tablet views.

- Send a test email
    - Note: Emma proofs emails for errors such as pixel size and length. Before sending a test or regular email, you will have the chance to review these errors.
    - Select **Send test.**
    - Fill out the following fields:
        - To: Type individual email addresses or select a group
        - Subject line: What you would like to display as the subject line of the email
        - Preheader text: Small blurb under the subject link

- Sender Name: Name that should be displayed as the sender (example: OHIO Information Technology)
- Sender email: The email address that should be displayed as the sender (example: it@ohio.edu)
- Reply to: The email address replies should be sent to it@ohio.edu, however this is not a receiving inbox. If you need to receive replies, the requestor should supply the appropriate email address.
- Google analytics: See below panel for information regarding analytic perimeters set up by UCM
- Select **Send now**

- Review and send
  - Once the test email has been approved, select **Review and send**
  - Follow the same prompts as above.
  - Click **Send now** or **Schedule for later**

Response

The response section allows you to view important metrics for each email that has been sent.

1. Navigate to the Response tab.
2. Find the email you wish to view metrics for and click on the drop-down arrow on the right, directly below the send date information.
3. A new screen will display the email's opens, clicks, shares, new sign-ups, opt-outs, a heatmap of clicks, and several other metrics.
4. You can export email response metrics by clicking "export responses" in the top right of the screen.

Automation

This section allows specific workflows, such as drip campaigns, to be set up. These automated workflows can have very specific filters applied to them and can be saved for future use. At this time, OIT is not using the automation feature of Emma.

Insights

The insights section contains a deep dive into email analytics. It can be helpful in learning more about audience engagement (growth, trends, and experts) and the data can be used to determine which items your audience(s) are most interested in.

- This area provides a snapshot of overall engagement; it is based on all sent emails, not just one email or campaign
- It also provides an overview of your data from a user perspective
  - This overview includes total campaigns sent, total emails sent, delivery rate, unsubscribe rate, and bounce rate
  - You can view this data in a chart or text, and you are able to set date parameters to measure analytics by date
  - All reports can be exported as a .csv file

Google Analytics

If you wish to capture Google analytics for a mailing, very specific parameters must be set up. Please see [Naming Conventions: Google Analytics] for further guidance from UCM. Using these parameters will allow UCM to determine where people are navigating from the newsletter.
Below is an example of what it looks like to track users when linking out of the newsletter:

i.e. {Name of email-date-sub account name}
name-of-email_100520_OIT

Additional Help

For further help, assistance, or guidance visit the [Emma help website] or contact:

- [Nick Claussen], Organizational Communications Specialist (UCM)

Creating Mass Emails in the EMMA Builder Editor

Definitions of Tabs and their Uses

Before reviewing the procedural parts of this documentation it’s best to gain a firm understanding of the component names and how they interact with each other.

- **Content:** Rows can have multiple types of content modules. This includes titles, paragraphs, lists, images, buttons, dividers, videos, icons, and menus. Content can also be created/edited with HTML. Each content module can be customized to fit the style of the intended communication. This includes padding, margins, font color, size, and background.
- **Rows:** Each email draft is subdivided into multiple rows. Individual rows contain multiple types of content and row settings. Rows can also be divided into multiple columns. Each row can be customized to fit the style of the intended communication. This includes padding, margins, font color, size, and background.
- **Settings:** These are the general settings for the overall appearance of the email. These settings are not applied to specific rows or content modules.

Create a New Builder Editor Email

1. Log into the Office of Information Technology EMMA subaccount.
2. Select the **Campaigns**
3. Select **Create a New Campaign**.
    a. Note: Email Templates are only accessible when Creating a New Campaign.
    b. Sometimes an A/B test may be desirable if needing to test an email design's effectiveness. The test allows a sender to deliver the same message at different dates/times.
4. Select **Regular Email**.
5. Name the Campaign in the **Campaign Name field**.
6. Select **Continue**.
7. Under **My Gallery** select **Shared templates**.
8. Select a template that is described as an "Editor." This information can be found in the lower right corner of the template thumbnail.
    a. Make sure that the template meets your current needs. Four Builder Editor templates currently exist in Shared templates. These are:
        i. **OHIO Master:** For all generic communications.
        ii. **OIT – IT Weekly:** IT Weekly newsletter only.
        iii. **Go OHIO:** Communications related to Go OHIO.
        iv. **Generic Message**
    b. Move your cursor over the desired template.
    c. A button titled **Start Here** will appear.
    d. Select **Start Here**.

NOTE:

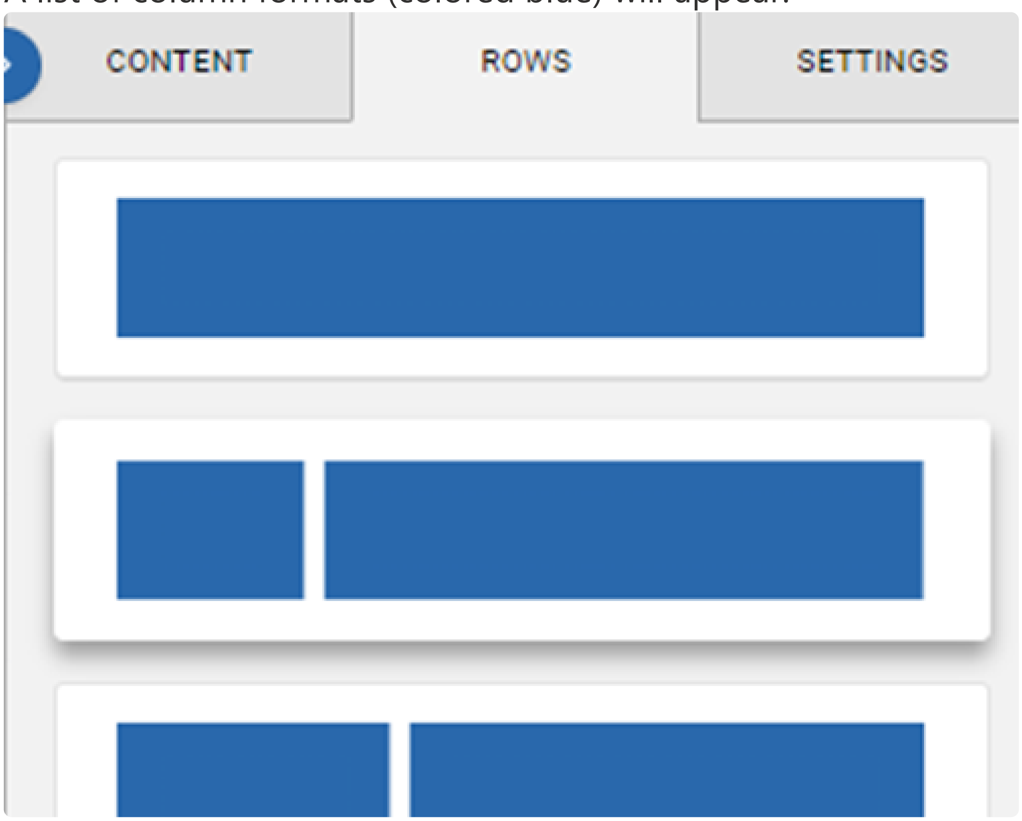
- Existing templates can be customized to fit the desired style and organization. Simply delete or add rows and content to meet your current needs.
- Be aware that some email templates have locked header rows. These rows can only be altered by UCM. If the locked rows do not meet your current needs, evaluate all available templates to find the one that best serves your needs.

Rows and Content Functions/Settings

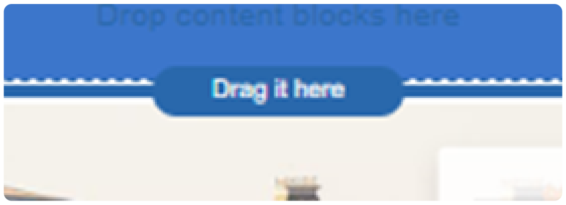
Row Functions

Add Rows

1. Select the **Rows** tab on the right navigation.
2. A list of column formats (colored blue) will appear.



3. Select the desired format with your cursor and drag into the main body of the email.
4. As you drag the new row across the existing rows, the phrase “Drag it here” will appear above and below each row.

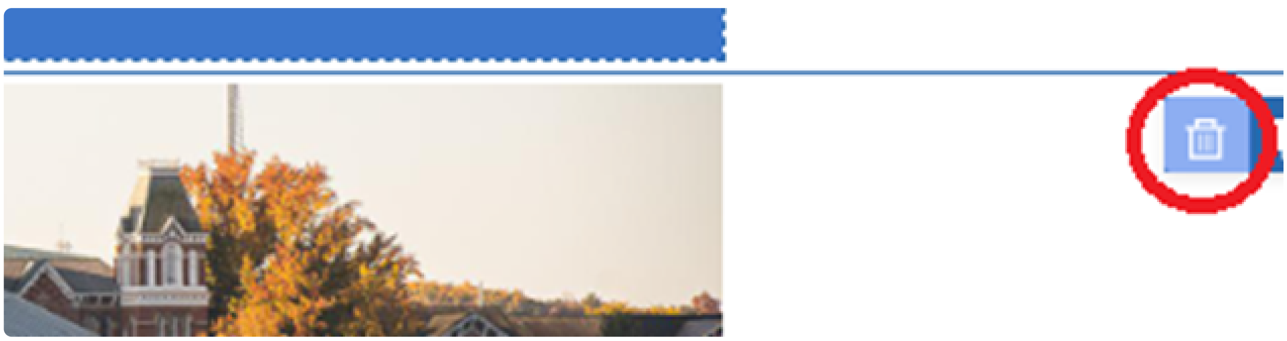


5. Place the new row either above or below and existing row.
6. Once the new row is in its desired location you can now drag content modules from the Content tab on the right navigation menu.

Row formats are organized with 1-6 possible columns. The formatting (shape and size) of the columns vary with each possible row selection.

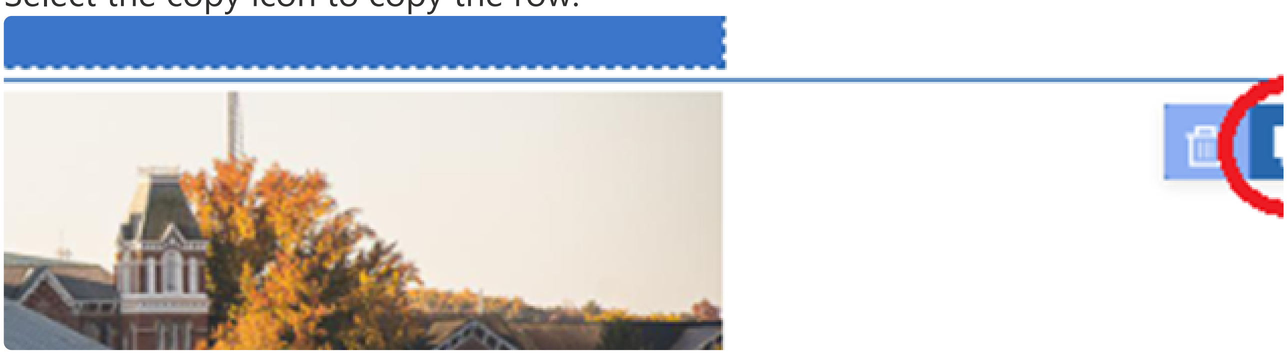
Delete Rows

1. Select the row in the white/negative space to the left or right of the content.
2. A trashcan icon will appear in the upper right corner of the row.
3. Select the trashcan icon to delete.



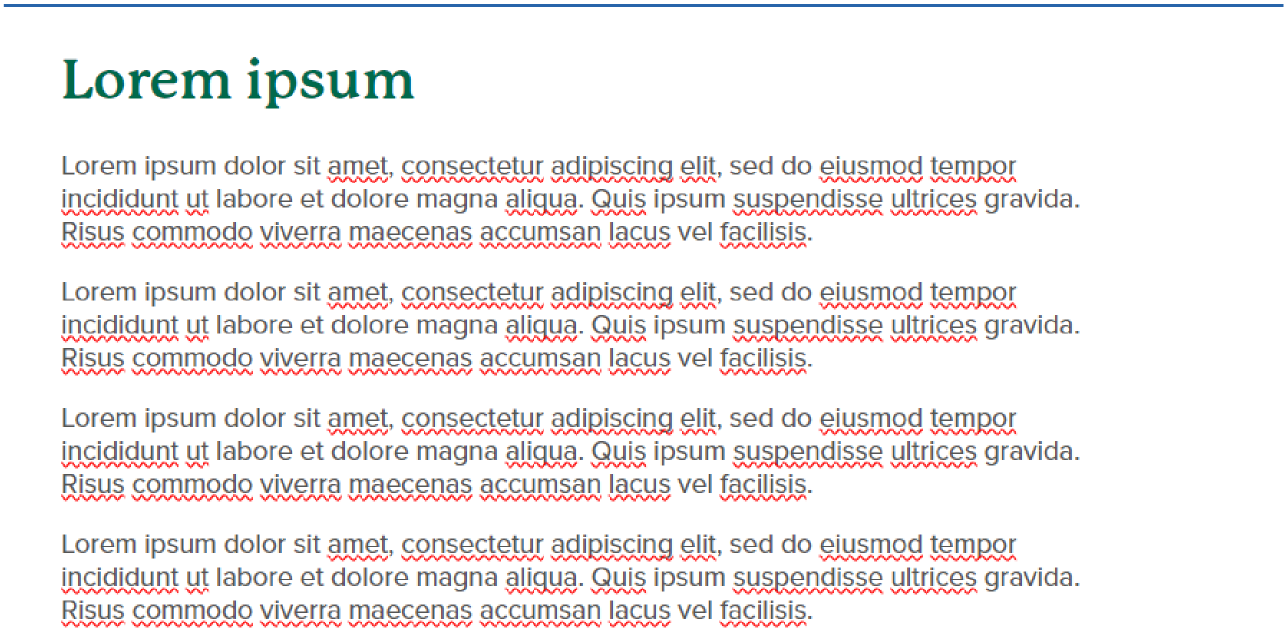
Copy Rows

1. Select the row in the white/negative space to the left or right of the content.
2. A copy icon will appear in the upper right corner of the row.
3. Select the copy icon to copy the row.



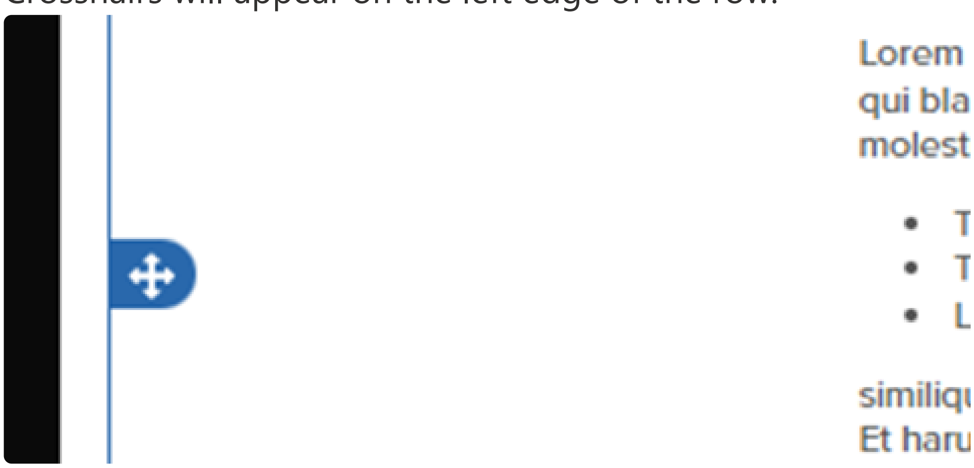
Row Settings

1. Select the row where changes are desired.
2. The right navigation will switch to the **Row Properties**
3. Make changes as desired.



Move Rows

1. Place your cursor over a row.
2. Crosshairs will appear on the left edge of the row.

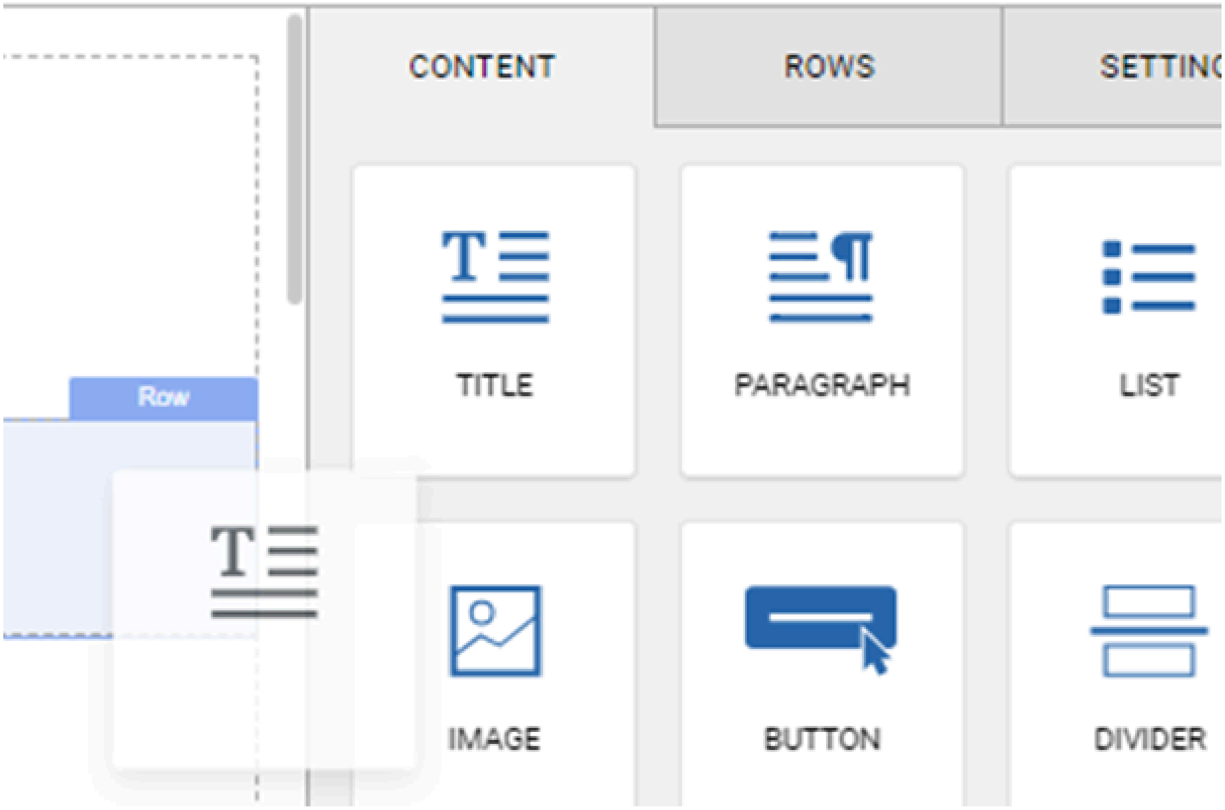


Content Module Functions

Add Content to Rows:

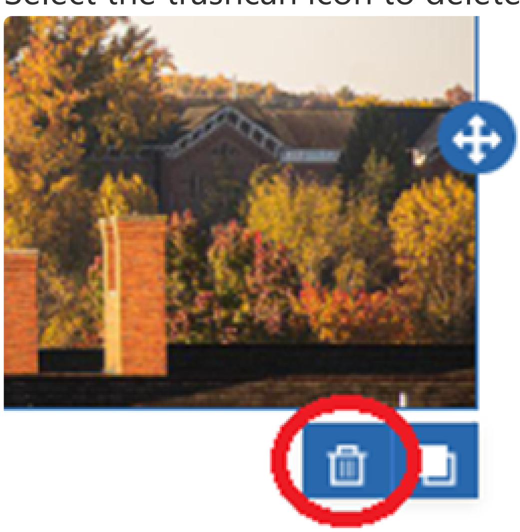
1. Select the **Content tab** from the right navigation menu and drag into an empty row/column.

2. Edit the new content space as needed.



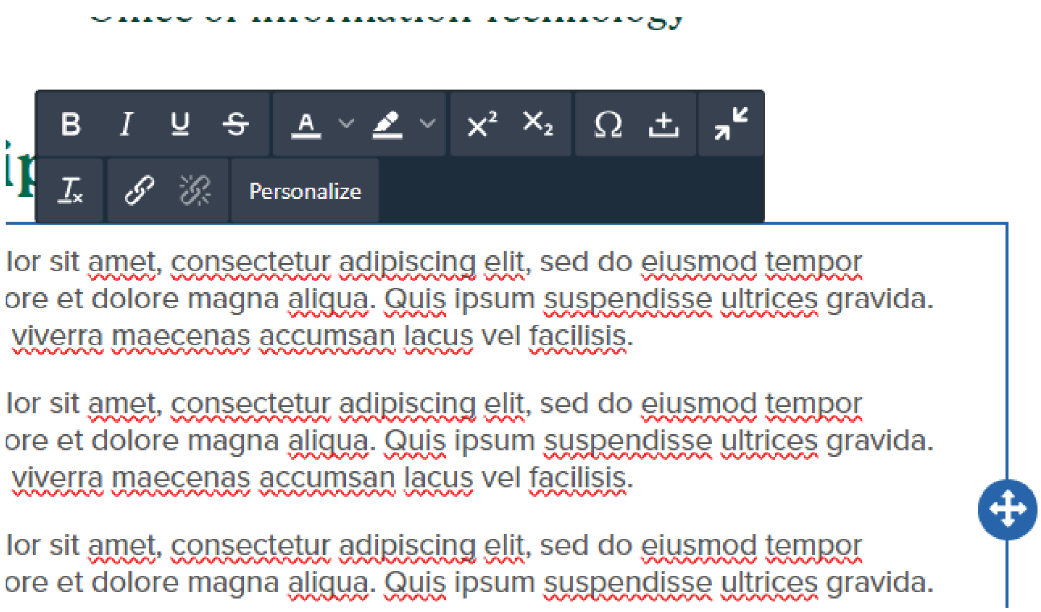
Delete Content from Rows:

1. Select inside the content area between the left or right white/negative space.
2. A trashcan icon will appear in the lower right corner of the content area.
3. Select the trashcan icon to delete the content in the row.



Content Settings

1. Select the content in the row where changes are desired.
2. The right navigation will switch to the **Content Properties**
3. Make changes as desired.



Undo/Redo

1. Immediately following an action, an undo/redo arrow will appear in the bottom left corner. Select as desired.
2. There is also a time revert button which allows you to revert the email draft to a prior state.

General Email Settings

> **NOTE:** These settings only apply to the overall look and style of the email. They do not apply to the individual content/row items.

1. Select the Settings tab in the right navigation column.
2. Make changes as desired. Potential changes include:
    a. Content area width

b. Alignment
c. Background color
d. Content Area background color
e. Default font
f. Link color

Create a New Template

1. Follow the instructions in Create a New Builder Editor Email then return to this list.
2. Select the **Save** dropdown menu in the upper right corner of the page.
3. Select **Save as template** from the dropdown menu.

NOTE: Templates should be used sparingly. They should represent broader campaign concepts such as the Semester Start Instructor Technology email, the IT Weekly Newsletter, and Go OHIO.

Duplicate an Existing Email

1. Select the Dropdown menu **arrow** on the right edge of the email that you intend to duplicate.
2. Select **Duplicate** from the dropdown menu.
3. When the new duplicate email opens, select the **email name** at the top left corner of the new email.
4. Change the name to fit your current needs.

Send a Test

1. Select the Send test button in the upper right corner of the email.
2. Type the desired recipients into the **To***
3. Add any special notes that you wish for the recipients to see in the **Note**
4. Select **Send test**.

Schedule/Send an Email

1. Select the **Review** button in the upper right corner of the email.
2. Begin typing the name of the desired distribution list in the Recipient field. If the distribution has been uploaded correctly, it should autofill once you begin typing.

This can also be a single individual's email address.
3. Select **Enter** to load the distribution into the field.
4. Enter a **Subject line** and a **Preheader text**. The subject link should describe what the email is about and the preheader text should be a call to action to impel the reader to action.
5. Select the **Add Google Analytics** button from the lower left corner of the page.
6. Review [Naming Conventions for Google Analytics] to ensure the correct convention is being used.
7. You can either select **Send now** to send immediately, or **Schedule for later**.
8. If scheduling for later be sure to have notification email addresses ready. Emma does not have a database of emails. You will have to provide these.
9. Use the scheduler to pick a date and time.

NOTE: Make sure that all distribution lists are properly vetted before sending a mass email. There are certain legal requirements that must be met. Visit Mass Email Distribution List Initial Preparation to learn more.